

How A World-Class Construction Company Supercharges its Business Development With Unanet CRM

Motivation for Seeking a New CRM Solution

For over 150 years, Gilbane Building Company (“Gilbane”) has remained at the forefront of the construction management industry by embracing advanced construction technologies that allow it to deliver innovative solutions to every customer. However, the firm recognized the need to extend this technology-driven approach towards its client management practice.

Gilbane sought a best-in-class CRM solution that would ensure that the interests of its Business Development (BD) teams were as equally well-managed as the firm’s construction initiatives.

The Challenge

- **Relationship and pipeline management.** The construction industry is largely relationship-driven, but Gilbane’s Business Developers lacked a platform that could centralize information around project pursuits, upcoming opportunities, pipeline performance, and shared customers across offices.
- **Knowledge sharing and collaboration.** The company struggled to capitalize on its collective expertise across projects, locations, and disciplines to enhance project execution capabilities. Cross-functional communication and collaboration were minimal.
- **Scalability.** To maintain its competitive edge in a rapidly evolving industry landscape, Gilbane needed a powerful tool that could empower their Business Developers to significantly scale their efforts without sacrificing performance.
- **Efficiency.** Gilbane’s lean culture shapes every aspect of the business—including its technologies. Leadership recognized the need to evolve its existing processes and platforms with a new CRM solution that could unlock substantial efficiencies and deliver long-term value.
- **Insights and reporting.** Predictive analytics, accurate ROI forecasting and comprehensive reporting became increasingly pressing imperatives as the organization continued to experience significant business growth.



Founded in 1870, Gilbane, Inc. is one of the largest privately held and family-owned construction and real estate development firms in the industry. Headquartered in Providence, RI, Gilbane boasts a dedicated team of over 2,800 multidisciplinary professionals across 45 offices in the United States and abroad. Its subsidiaries include Gilbane Building Company.

The CRM Solution

Following a rigorous due diligence and vendor selection process, Gilbane chose Unanet CRM by Cosential for several reasons:

- **Industry-leading relationship management capabilities.** Unanet CRM's cutting-edge features empower rapid business development by simplifying tasks such as extracting strategic company information from websites and social media, consolidating prospect and customer records, and automating call logging and meeting plan creation.
- **Comprehensive email integration.** With Unanet CRM's drag-and-drop functionalities, smart auto-associations and pre-populated forms, Business Developers can move their opportunities and manage their pipelines without having to leave their email applications.
- **Streamlined data entry and workflow functions.** Business Developers can effortlessly track revenue, calculate project-specific gross margins and generate valuable insights without having to waste valuable time on offline data entry and manual tracking processes.
- **Easy reporting and dashboarding.** Unanet CRM makes it easy to present key data with a variety of visually engaging dashboards and customizable reports, allowing users to make informed decisions based on comprehensive insights.
- **Partnership.** The Unanet team demonstrates outstanding commitment towards customer satisfaction, striving to understand customers' unique business considerations, strategic goals and product vision in order to deliver maximum value on their investment.

The Approach

The Unanet team and Ryan Hutchins, Executive Vice President of Gilbane, together spearheaded the following process to deliver and drive adoption of the new CRM solution.

- **Secure buy-in with a compelling proposal.** The decision-making committee included representatives from multiple functions, including Business Development, Internal Sales, Marketing, Operations and even the Chief Information Officer. Over multiple in-person meetings, product demonstrations and proposal evaluations, Unanet diligently crafted a proposal that resonated with every participant at the table.
- **Meticulously plan for implementation.** To successfully deploy the new CRM solution and create strong digital ties across all businesses, Gilbane needed unwavering support throughout planning and implementation. Hutchins cited Unanet's continued partnership as a key factor for success.
- **Increase user adoption.** Unanet allied with Gilbane to deliver a comprehensive CRM user educational program that included ample individual and small-group training, multiple information sessions and Q&A opportunities to reinforce learnings.
- **Generate excitement with project champions.** Successful change initiatives rely on influential leaders throughout the process. The implementation team identified the "power users" most passionate about innovations provided by Unanet CRM; these individuals became natural advocates, driving engagement with the new system.
- **Improve user experience through seamless integration.** The mobile application functionality and email integration capabilities created a frictionless user experience, inserting the Unanet CRM experience into environments Business Developers already used daily.

"Unanet's level of commitment and partnership was a big factor in our decision-making. We felt confident in our choice to roll out Unanet CRM."

"Technology has changed the way we build buildings. Now, with a true CRM system, it is also enabling us to change the way we build our business."

**– Ryan Hutchins,
Executive Vice President**

The Impact

- **Improved interdisciplinary collaboration and pipeline efficiency.** With an intuitive tool to facilitate collaboration with Marketing, Business Developers can quickly and easily access the resources needed to drive new project pursuits. After implementation, the firm saw a 60% increase in collaboration from the enhanced connectivity across project and pursuit data.
- **Centralized knowledge-sharing.** Unanet CRM serves as a centralized repository for Gilbane's institutional knowledge, allowing users to leverage and share best practices and up-to-date information on emerging trends, project insights, technological advancements, operational issues, cost details and vendor information across offices.
- **On-the-go access to critical information.** Business Developers often need quick and unobstructed access to historical customer information like past project data and communication records. "With Unanet CRM, Business Developers can scroll through and find what they need at their fingertips instantly," noted Hutchins.
- **Data-driven decision-making.** By connecting historical data, current considerations, and future goals, leadership can more confidently make decisions to drive the strategic imperatives of the business.
- **A more positive company perception.** In choosing Unanet CRM to better serve its internal and external clients, Gilbane has firmly positioned itself as an organization committed to technological innovation in all aspects of the company, from delivering innovative construction projects to nurturing strong client relationships.

Meet Unanet CRM by Cosential

Unanet CRM enables Architectural, Engineering, and Construction (AEC) firms to increase revenue while decreasing the cost of winning new business, with Growth and Relationship Management software and services that bring order, control, speed, and efficiency to business development and marketing processes.

As the leader in Growth and Relationship Management software for the AEC industry for over 20 years, we have helped more than 1,000+ AEC firms increase annual revenue and improve productivity in key business development processes by up to 50%.

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